

Notes

The job aid tasks below are identified for supervisors or subordinates.

If this is not your first plan, you may have to first click **List All Plans**.

The Effective Date and the Expiration Date are filled in according to your selection in Step 5.






Now that you've created the plan, you can add a goal.

Creating An IDP

This job aid will take you through the steps for Creating a new IDP, adding a non-competency based goal and submitting that plan to your supervisor for approval. Be sure to complete the steps in order. **Important! – If you created any previous IDPs, those older plans must have a status of EXPIRED. You will not be able to submit a new IDP for approval if any of your previous plans does not have a status of EXPIRED. If a previous plan is in a DRAFT status, you must delete that plan before you will be able to submit a new plan. If a previous plan is in a Submit/Pending status, contact your AgLearn Agency lead to report the problem. A list of AgLearn Agency Leads can be found by clicking the Contact Us link on the AgLearn Home Page.**

Create a New IDP

Creating new plans should always be done by the direct report (subordinate), not the supervisor.

Step	Activity	View															
1.	From the AgLearn Home Page, click the Career tab.																
2.	Click Create New Plan .																
3.	Enter a plan title.	 * Plan Title: <input type="text" value="FY09 IDP"/>															
4.	Click the Plan Period Select link.	* Plan Period: <input type="text"/> Select Clear Plan Purpose: <input type="text"/>															
5.	Click the corresponding Select link for your plan period.	<table border="1"> <thead> <tr> <th>Date Period ID</th><th>Description</th><th></th></tr> </thead> <tbody> <tr> <td>CY2008</td><td>Calendar Year 2008</td><td>Select</td></tr> <tr> <td>CY2009</td><td>Calendar Year 2009</td><td>Select</td></tr> <tr> <td>FY2009</td><td>Fiscal Year 2009</td><td>Select</td></tr> <tr> <td>Q1FY08</td><td>First Quarter Fiscal Year 2008</td><td>Select</td></tr> </tbody> </table>	Date Period ID	Description		CY2008	Calendar Year 2008	Select	CY2009	Calendar Year 2009	Select	FY2009	Fiscal Year 2009	Select	Q1FY08	First Quarter Fiscal Year 2008	Select
Date Period ID	Description																
CY2008	Calendar Year 2008	Select															
CY2009	Calendar Year 2009	Select															
FY2009	Fiscal Year 2009	Select															
Q1FY08	First Quarter Fiscal Year 2008	Select															
6.	Enter a Plan Purpose , if desired.	* Plan Title: <input type="text" value="FY09 IDP"/> * Plan Period: <input type="text" value="Fiscal Year 2009"/> Select Clear Plan Purpose: <input type="text" value="To Identify My Developmental Goals for FY09"/> Effective Date: (MM/DD/YYYY) <input type="text" value="10/1/2008"/> Expiration Date: (MM/DD/YYYY) <input type="text" value="9/30/2009"/>															
7.	Click Add .																
8.	Review the fields to make sure you have entered the information correctly.	<div> Plan Title : <input type="text" value="FY09 IDP (Select Other Plan)"/> </div> <div> * Plan Title : <input type="text" value="FY09 IDP"/> </div> <div> Plan Status : <input type="text" value="Draft"/> </div> <div> Effective Date: <input type="text" value="10/1/2008"/> </div> <div> Plan Period : <input type="text"/> Select Clear </div> <div> Plan Purpose : <input type="text" value="To Identify my developmental goal"/> </div> <div> Version : <input type="text" value="0 (current)"/> </div> <div> * Expiration Date: <input type="text" value="9/30/2009"/> </div>															
9.	Click New Goal .																

Create a New IDP

It's a good idea to increment goal numbers by multiple numbers so that you can later add goals between established goals.

Once the meeting has occurred, you can update the status, inserting a "1" to indicate the meeting took place.

At this point, make NO more changes to the IDP until after you receive notification that your plan has been approved.

The email alerts your supervisor to approve your plan. Once approved, you'll receive another email informing you of the approval.

- 10.** Enter a **Goal number**, **Goal Name** and **Goal Description**. Choose an available **Section**.

Note: Goal numbers are arbitrary, but must be unique.

Goal Number:
 * Goal Name:
 Goal Description:
 Goal Category: [Select](#) | [Clear](#)
 * Section:

- 11.** Add a Target Date and a Target Value.

Note: Target values can indicate a percentage (100) or a simple "1" for accomplished.

Priority: [Select](#) | [Clear](#)
 * Target Date: 
 Target Value:
 (1000,001)
 Stretch Value:
 (1000,001)

- 12.** Click **Finished**.



- 13.** Click **Submit for Approval**.



- 14.** The message to your right displays, but the **Submit for Approval** button is no longer available.

⚠ This plan contains changes that have not been approved.

- 15.** Note the current version of your plan.

Version :

- 16.** Review your email from **aglearnsystem@usda.gov**.
Note: The email will be directed to your supervisor with a cc to you.

Subject: Plateau Plan Review
 Attachments:
 Alaska, Susie has submitted a new Plan (My FY09 plan) for Alaska, Susie that requires your Review and Approval. Please log in to Plateau and review this plan as soon as possible. Contact your Plateau System Administrator if you have any questions.